



## DEPARTMENT OF INSURANCE

### STATE OF ARIZONA

*Financial Affairs Division – Tax Unit*

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## INSTRUCTIONS FOR COMPLETING FILLABLE FORMS ON-LINE

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Most of our tax forms and related schedules, as well as some forms related to the Annual Statement filing can now be completed on line in a fillable form. Some of the forms contain fields that will do the calculations for you. Most forms are set up to advance from left to right by rows however, some forms with multiple pages may advance from top to bottom within columns on Page 2 or Page 3. **Before entering any data, you can test the sequencing pattern by pressing the TAB key and watching where the cursor goes.**

To start, open the form and press the **TAB** key. After entering your data, press the **TAB** key again to move to the next field. To go back to a previous field, hold the **SHIFT** key down while you press the **TAB** key.

### Reset Button

On some of the main forms, there is a reset button located at the top of the form; you can press that button to erase **ALL** the fields on the form.

### Unformatted Text Fields are:

- NAIC #
- Company Name
- Group #
- Federal ID #
- Address lines
- Preparer
- Dates (you may enter date as Jan 1, 2005 or 01/01/05)

### Formatted Text Fields are:

Phone # or Fax number. Enter the 10 digits without any slash marks or hyphens, etc.

### Formatted Numeric Fields

In all numeric fields, the cursor must be positioned at the right-hand side of the field, and you must enter the entire figure, including the decimal point and cents. When a form calls for percentages, enter the actual percentage, for example, **for 2% enter .02** and not just 2.

### Calculated Numeric Fields

These fields will **automatically calculate** an amount based upon other related entries. They will already contain **"0.00"**. You will not be able to enter data in these fields.

### Check Boxes (areas on the form where you would normally write an "X" or check mark)

To have an "X" marked in a check box, use your mouse and click on the box or type in X.

To remove an "X" from the check box, click on the box again, or hit the delete key.

### Option Boxes (areas on the form where you need to choose on option among two or more options)

With option boxes one of the options will always be selected. To change the option that is selected, use your mouse and click on the correct option.

**NEED HELP? Please call between 8 AM to 5 PM Monday through Friday**

(602) 364-3998 for Annual or Quarterly Tax forms and related schedules

(602) 364-3999 for Annual Statement forms

(602) 364-3246 Installment Tax, Surplus Lines Tax, or Industrial Insured Tax forms